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ABSTRACT

Survey data and exhibits are presented from all 50 states concerning the planning and financing of public school facility design and construction. Survey results are displayed in two formats. The first is a pictorial display of the data that shows each state's Department of Education's response on a United States map. Accompanying these exhibits are reference notes, as written by the states or compiled from supplemental materials, that further explain their responses to the survey. The second format is in Appendix A and shows a copy of the questionnaire with a frequency distribution of the responses to each question. Appendix B lists the survey's respondents. (GR)

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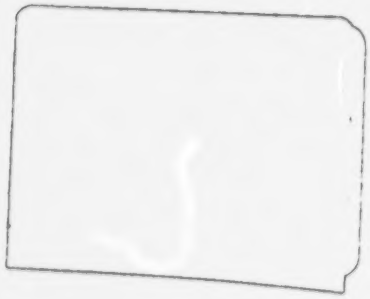
ED 460 606

SCHOOL CONSTRUCTION SPECIFICATION AND FINANCING

NATIONAL SURVEY DATA 1994



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for Hawaii's State Department of Education
June 1994

EF 005 489

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This survey report was developed as part of a major state education facilities study we are currently conducting for the Hawaii Department of Education. We are appreciative of the assistance provided by the officials in each state in responding to our written survey and our follow-up telephone calls. With the approval of the Hawaii Department of Education, we are pleased to provide this copy of the report to you.

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MGT of America, Inc., is one of the nation's leading educational facilities assessment, planning and budgeting firms. Our facility condition assessment instrument has been used to evaluate hundreds of facilities. Our automated space assessment model has been used to determine the amounts of space needed by school districts and colleges around the nation. We have assisted numerous school districts, colleges, universities, and state education agencies in developing facility plans and funding and budgeting systems. We have conducted major education facility studies in the states of California, Washington, Idaho, Texas, Wyoming, New Hampshire, South Carolina, New York, and Florida.

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INTRODUCTION

The following exhibits summarize survey data collected from every Department of Education (DOE) in all of the 50 states concerning the planning and financing of public school facility design and construction. The survey was conducted as part of a study for Hawaii's DOE to determine the planning and financing practices used across the country.

The reader should keep in mind that this survey was designed so as not to duplicate information available from published sources. It therefore does not attempt to address every possible aspect of state school construction assistance programs. It does, however, provide the most up to date information on those programs.

The survey results have been displayed in two formats. The first is a pictorial display of the data that shows each DOE's responses on a United States map. Accompanying these exhibits are reference notes, as written by the states or compiled from supplemental materials, that further explain their responses to the survey. The second format is in Appendix A and shows a copy of the questionnaire with a frequency distribution of the responses to each question.

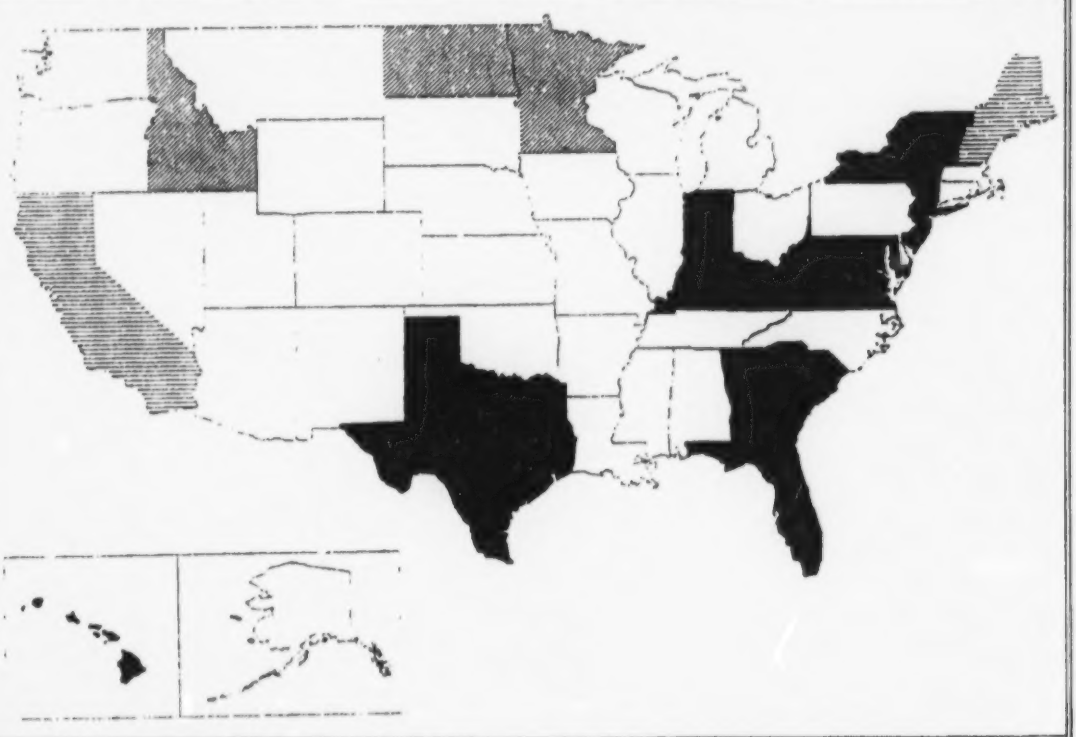
Appendix B lists the survey's respondents to whom we would like to extend our sincere appreciation for taking the time to assist us in this important study.

EXHIBIT 1

ADHERENCE TO SPECIFIC DESIGN CRITERIA
(N=50)

INSIST ON ADHERENCE TO SPECIFIC DESIGN CRITERIA FOR NEW SCHOOL CONSTRUCTION (OTHER THAN BUILDING CODES, ADA, ETC.)

Response	Response Rate(%)	Legend
Yes - in all cases	28.0	AR, FL, GA, HI, IN, KY, MD, NJ, NY, SC, TX, VA, VT, WV
Yes - only when state funds are involved	6.0	CA, ME, NH
Yes - when the cost is over a certain dollar amount	6.0	ID, ND, MN
No, but we have recommended guidelines	34.0	AK, AL, CT, DE, IA, MA, MI, MO, MS, NC, OH, OK, OR, SD, TN, UT, WY
No	26.0	AZ, CO, IL, KS, LA, MT, NE, NM, NV, PA, RI, WA, WI



REFERENCE NOTES FOR EXHIBIT 1: *ADHERENCE TO SPECIFIC DESIGN CRITERIA*

Further explanation provided by the states:

ID: Insist on adherence to specific design criteria for new construction if state funds involved exceed $25,000.

ND: School facility construction must conform to uniform commercial school code specifications at a minimum when state funds involved exceed $25,000.

MN: Insist on adherence to specific design criteria for new construction if state funds involved exceed $400,000.

Other agencies required to approve educational specifications:

AL: State Building Commission

FL: Governor and Cabinet of the State Board of Education

GA: Dept. of Human Resources (DHR), Fire Marshal, and Local Building Dept.

HI: Department of Budget and Finance

ID: Department of Labor and Industrial Services

MD: If construction is funded by the state's public school construction program, then specifications must be reviewed by representatives from the Office of Planning, Department of General Services, and the Board of Public Works

ME: State Board of Education

NH: Health and Human Services, Fire Marshall Office, Dept. of Water Supply and Pollution Control

NM: Governor's Committee on Concerns of the Handicapped (for ADA); Construction Industries Division (for building code); and Department of Energy and Minerals (for energy conservation)

OR: Local Planning Agencies

PA: Labor and Industry

RI: State Building Commissioner

VT: Department of Labor and Industry

WV: School Building Authority of West Virginia

ADHERENCE TO SPECIFIC DESIGN CRITERIA (OTHER THAN BUILDING CODES, ADA, ETC.) FOR NEW SCHOOL CONSTRUCTION
(n=20)

	CLASS SIZE	CLASS CPCTY	SP ED	RE-SRCE	KR-GTN	FOOD SVC	COUN-SLING	STRGE SPACE	DSPLY-TACKBD	VOC ED	ARTS-CFTS	MUSC	SCI	FOR LANG	ADM	LIBRY	PE	BLK-WHT BRDS
INSIST ON ADHERENCE - IN ALL CASES																		
AR	✓	✓	✓	✓	✓		✓			✓	✓	✓	✓	✓	✓	✓	✓	
FL	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
GA	✓	✓	✓		✓	✓			✓	✓	✓	✓	✓	✓		✓	✓	✓
HI	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
IN	✓	✓	✓	✓	✓			✓		✓	✓	✓	✓		✓	✓	✓	
KY	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓	✓		✓	✓	✓	✓
MD				✓									✓			✓		
NJ	✓	✓	✓	✓	✓					✓	✓	✓	✓	✓	✓	✓	✓	
NY	✓	✓	✓	✓	✓	✓	✓			✓	✓	✓	✓	✓			✓	
SC	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
TX	✓	✓			✓											✓	✓	
VA	✓				✓	✓	✓		✓		✓	✓	✓		✓	✓	✓	✓
VT	✓		✓	✓	✓	✓					✓		✓			✓		
WV	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
INSIST ON ADHERENCE - ONLY WHEN STATE FUNDS ARE INVOLVED																		
CA	✓		✓	✓	✓	✓	✓			✓	✓	✓	✓		✓	✓	✓	
ME	✓				✓	✓				✓	✓	✓	✓			✓	✓	
NH	✓	✓			✓	✓		✓		✓	✓	✓	✓	✓		✓	✓	
INSIST ON ADHERENCE - WHEN THE COST IS A CERTAIN AMOUNT																		
ID	✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓		✓	✓	✓	✓
MN	✓	✓		✓	✓						✓	✓	✓			✓	✓	
ND	Did not specify which categories must have criteria/guidelines.																	

DO NOT INSIST ON ADHERENCE, BUT HAVE RECOMMENDED GUIDELINES

AK, AL, CT, DE, IA, MA, MI, MO, MS, NC, OH, OK, OR, SD, TN, UT, WY

8

DO NOT INSIST ON ADHERENCE

AZ, CO, IL, KS, LA, MT, NE, NM, NV, PA, RI, WA, WI

9

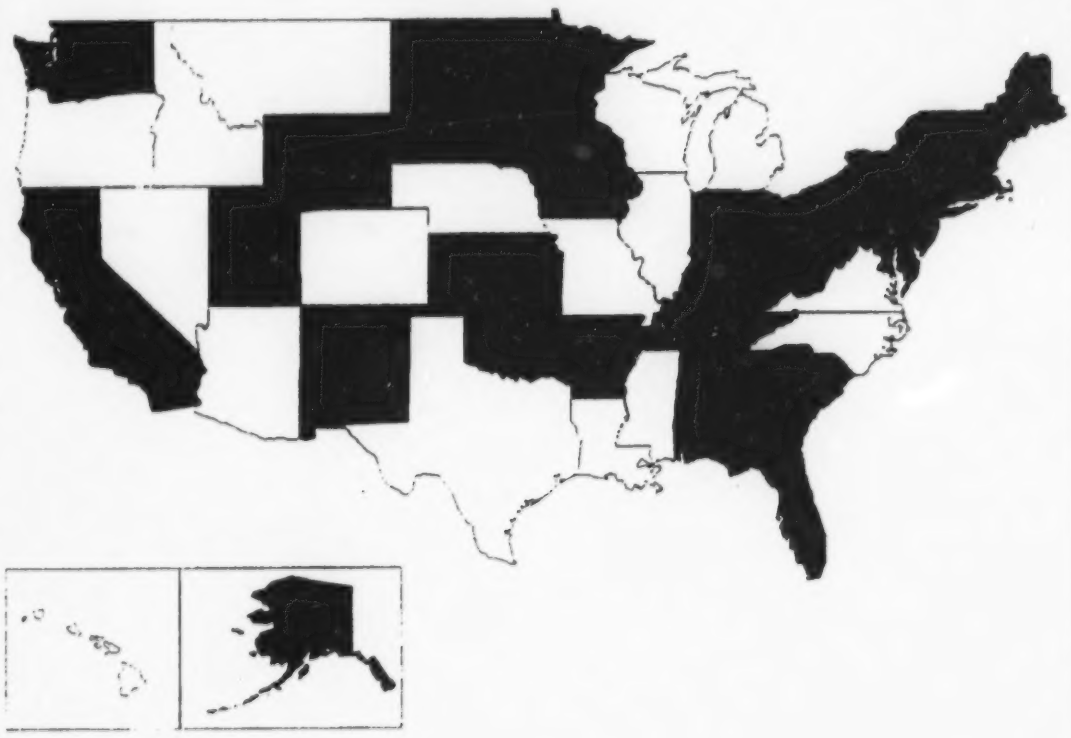
8

EXHIBIT 3

PLANS SUBJECT TO REVIEW BY THE STATE'S DEPARTMENT OF EDUCATION
(N=50)

RESULTING PLANS OF EDUCATIONAL SPECIFICATIONS THAT HAVE BEEN DETERMINED IN WHOLE OR IN PART ON THE LOCAL LEVEL ARE SUBJECT TO REVIEW BY THE STATE'S DEPARTMENT OF EDUCATION

Response	Response Rate(%)	Legend
Yes	66.0	AK, AL, AR, CA, CT, DE, FL, GA, IA, IN, KS, KY, MA, MD, ME, MN, ND, NH, NJ, NM, NY, OH, OK, PA, RI, SC, SD, TN, UT, VT, WA, WV, WY
No	34.0	AZ, CO, HI, ID, IL, LA, MI, MO, MS, MT, NC, NE, NV, OR, TX, VA, WI



REFERENCE NOTES FOR EXHIBIT 3: *PLANS SUBJECT TO REVIEW BY THE STATE'S DEPARTMENT OF EDUCATION*

General description of process as provided by the state:

AK: DOE reviews final construction documents for adherence to education specifications.

AL: Reviewed for educational specifications by the school architect and division staff; the State Building Commission reviews for code.

AR: Plans are subject to review by the DOE for compliance with all regulations stipulated prior to construction. For those plans designed prior to regulations commencing, but which began construction after regulations have taken effect, the plans must be revised to comply with newly stipulated regulations.

CA: All schools seeking funds through the Leroy Greene Lease-Purchase Program are required to submit a five-year facility plan which identifies various school needs and the funding sources. This practice attempts to ensure compliance with CDE (California Department of Education) standards including site selection, school needs, acceptable capacity and utilization. For those non-self-certified districts, the plans must be submitted to the CDE. The district architect and Department of General Services will review these plans for compliance with standards. For self-certified-districts, the school or district must submit a written statement to the CDE that all plans comply with regulations and copies of the plans be transmitted to the Department of General Services and State architect prior to bid.

CT: All school construction projects are reviewed for compliance with all applicable codes.

DE: Schematic plans reviewed and approved by the Department. Preliminary and final plans reviewed and approved by Department and State Board of Education.

GA: Three step review process – preliminary, check set, and final review. Facilities Services Section coordinates reviews conducted by DOE curriculum, DHR, and Fire Marshal's Office. All of these areas must approve the drawings and specifications before Facilities Services will give final approval.

IA: Reviewed if over $25,000 for educational soundness; may make recommendations, but are not mandated.

KS: Reviewed for compliance with building codes and accessibility only.

KY: Reviewed for approval and adherence to KY administrative regulations prior to schematic plans being submitted for approval.

MA: Offer consulting to review plans and specifications.

MD: Whether state or locally funded, all specifications are reviewed by the department who also dictates the content of the specifications. The department also requires a certain make up for the local planning committee and serves in an advisory capacity to this committee.

ME: Local building committee works with architect to develop educational specifications and completes a Space Allocation Workbook. A Program Conference is held to arrive at agreement of appropriate space to support educational programs for state-subsidized projects.

MN: Review and comment for projects over $400,000. Includes regional planning and building viability.

ND: State electrical and plumbing inspectors and fire marshall must review and approve plans.

NH: Plans are reviewed for compliance with standards, assures compliance with other departments' standards from architect and/or other departments.

NJ: Educational specifications are sent to the Dept. of Ed. and read and reviewed by education specialists for content, space relationships, program presentation insuring that all amenities to curriculum are covered.

NM: All construction over $25,000 is subject to review and approval by the Department of Education.

NY: We review the long-range education plan and the educational program.

OH: General, quick check.

OK: Code compliance (BOCA & Life Safety); state and federal regulations; and accessibility.

PA: We provide technical assistance at three specific stages of design.

SC: Schematic review and site plan review both with the architect at table and followed up by marked drawings; final review upon completion of design.

SD: Local LEA forwards plans to the Department of Education for initial review. A review is also undertaken by the State Department of Regulation – Fire Marshall.

UT: Reviewed for educational specifications by state program specialists; all facilities must be inspected (pre, during, and post) by ICBO certified inspectors (electrical, plumbing, structural, and technical).

VA: Architect must certify plans meet all regulations.

VT: Interagency review - Department of Labor and Industry, agency of Natural Resources, Historic Preservation - to discuss plans and needs of agencies.

WA: OSPI staff architect reviews educational specifications for required components (local school district approval has been obtained).

WV: Generally education specifications are developed locally. However, they are required to meet the minimal requirements of the State Handbook on Planning Schools and all School Building Authority requirements.

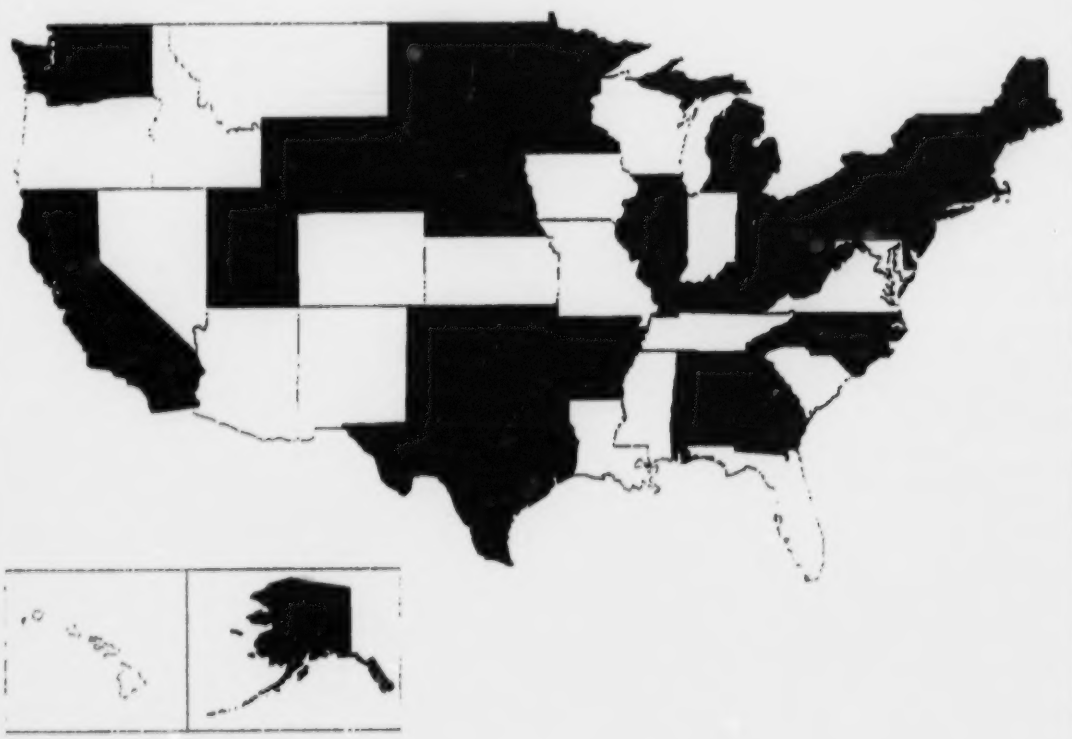
WY: State laws regarding economic and energy life cycles must be met.

EXHIBIT 4

SPECIFICATION OF SPACE GUIDELINES, STANDARDS, OR ALLOWANCES
(N=50)

SPECIFY GENERAL SPACE GUIDELINES, STANDARDS, OR ALLOWANCES (e.g., 100 GSF/pupil at grades K-6)

Response	Response Rate(%)	Legend
Yes	60.0	AK, AL, AR, CA, CT, DE, GA, IL, KY, MA, ME, MI, MN, NC, ND, NE, NH, NJ, NY, OH, OK, PA, RI, SD, TX, UT, VT, WA, WV, WY
No	40.0	AZ, CO, FL, HI, IA, ID, IN, KS, LA, MD, MO, MS, MT, NM, NV, OR, SC, TN, VA, WI



REFERENCE NOTES FOR EXHIBIT 4: *SPECIFICATIONS OF SPACE GUIDELINES, STANDARDS, OR ALLOWANCES*

Identification of guidelines as provided by the states:

AK: Space guidelines are dependent on enrollment and grade level. There are eleven enrollment ranges by elementary, secondary and combined grade levels in which each group is designated a minimum, average, and maximum GSF. For example, a school with an enrollment of 200 students at the elementary level is assigned a minimum GSF of 19,100, average GSF of 27,400, and a maximum GSF of 30,100. These floor areas exclude the exterior wall thickness.

AL: Generally 1,100 sq. ft. for kindergarten rooms and 900 sq. ft. for other classrooms, recommend no less than 30 sq. ft. per student

AR: K-6 is 750 sq. ft.

CA: K is equal to or less than 1,350. Generally, K-12 is less than 960 or 30 sq. ft./pupil.

CT: Elementary regular classrooms for 24 students is 32-40 sq. ft./pupil or 768-960 total sq. ft.; Pre-K and K for 24 students is 38-42 sq. ft./pupil or 912-1,008 total sq. ft.; and secondary for 22 students is 30-34 total sq. ft./pupil or 660-750 total sq. ft.

DE: Elementary is 840 GSF (67-70/pupil), middle is 700 GSF (92-120/pupil), junior high is 700 GSF (100-129/pupil), and senior high is 700 GSF (108-140/pupil). While local districts are not required to adhere to each sub-area allowance, the school must house the total number of students it is being built for and the state will only assist in funding the total sq. ft. in the formula for the intended capacity.

GA: Guidelines are based on teacher/pupil ratios, specific grade levels, and programs rather than GSF/pupil.

IL: K-6 is 76 GSF/pupil; 7-9 is 120 GSF/pupil; and 9-12 is 140 GSF/pupil

KY: Space allocations are included for varying sizes and types of schools

MN: Middle school 120-150 sq.ft./pupil; junior high 130-165 sq.ft./pupil or grades 7-12, 150-200 sq.ft./pupil; and senior high 160-200 sq.ft/pupil.

NC: regular classrooms pre-kindergarten 1,200 to 1,400 GSF; kindergarten 1,200 GSF; 1-3 1,000 to 1,200 GSF; 4-6 850 to 1,000 GSF; 7-12 750 to 850 GSF; Science for 7-8 1,000 to 1,200 (Math/Science 1,000); 9-12 Physical Sci, Bio, Phy, 1,200; Earth Sci. 1,400 GSF Chemistry and Multi Purpose Sci 1,500 GSF

ND: Through uniform commercial code, we recommend that schools (actually the architects who design the schools) look at Minnesota state standards as a model.

NH: Kindergarten - 50 sq.ft./pupil or 1,000 sq.ft., which ever is greater
Elementary - 50 sq.ft./pupil or 900 sq.ft., which ever is greater
Secondary - 50 sq.ft./pupil or 800 sq. ft., which ever is greater

NJ: Pre K-12; generally 20 sq. ft. net per occupant plus any moveable furniture and equipment. Requirements are different for other specialized uses.

NM: Although we do not specify guidelines, space must be adequate for educational purposes; a consultant will review plans for appropriateness.

NY: Kindergarten is 900 GSF, 1-6 is 770 GSF, and 7-12 is 770 GSF.

OH: K-6th 100 GSF; 7-8th 125 GSF; and 9-12th 150 GSF

OK: K-6 is 37.5 sq. ft./pupil (46.86 GSF), grades 7-8, 6-8, 7-9 are 59.5 sq. ft./pupil (73.75 GSF), and 9-12 60.0 sq. ft./pupil (75 GSF).

PA: K-6 is 92 sq. ft. and 7-12 is 123 sq. ft.

SC: We do not specify but do address in our materials as a guide: elementary - 100 sq. ft., middle/jr. 120 sq. ft., and high school - 140 sq. ft.

TX: a) Pre-K to 1st grade - 800 NSF or 36 NSF/pupil
b) 2nd to 12th - 700 NSF or 30 NSF/pupil (ele.) or 28 NSF (sec.)
c) Sci. lecture/lab - 41 NSF/pupil or 900 sq. ft. (ele.) to 50 NSF or 1,200 sq. ft. (sec.)
d) Primary gyms - 3,000 sq. ft. (ele.), 4,800 sq. ft (mid.), and 5,000 sq. ft (h.s.)
e) Libraries - 3 sq. ft. per enrolled student (min. 1,400 sq. ft (ele.), 2,100 sq. ft. (mid.), and 2,800 sq. ft (h.s.)

UT: Elementary is 72-76 sq. ft./pupil, middle/junior high is 115-125/pupil, and senior high is 145-154 sq.ft./pupil.

VT: Our state board rules are for grades K-12.

WA: For state funding purposes only, not related to program requirements:
a) K to 6 - 80 sq. ft./pupil
b) 7 to 8 - 110 sq. ft./pupil
c) 9 to 12 - 120 sq. ft./pupil
d) HC - 140 sq. ft./pupil

WV: School facilities have a sliding scale on square footage per student based on overall enrollment (for example 300 student elementary schools are sized at 110 GSF/pupil and 600 student elementary schools are sized at 80 sq. ft./pupil)

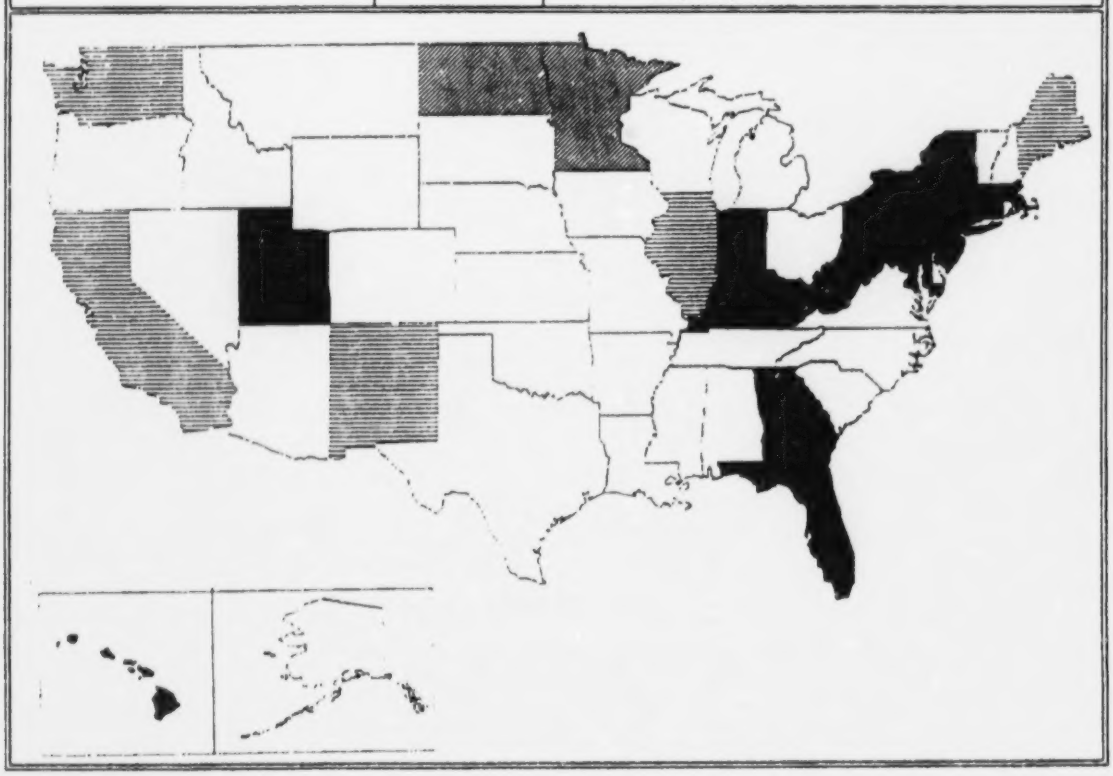
WY: Elem. 100 GSF/ADM, middle/jr. 125 GSF/ADM, and high school 150 GSF/ADM

EXHIBIT 5

NEED FOR MASTER PLAN IN DESIGN AND CONSTRUCTION
(N=50)

REQUIRE A SCHOOL'S MASTER PLAN TO BE IN EFFECT PRIOR TO THE DESIGN AND CONSTRUCTION OF NEW FACILITIES FOR THAT SCHOOL

Response	Response Rate(%)	Legend
Yes - in all cases	26.0	CT, FL, GA, HI, IN, KY, MA, MD, NJ, NY, PA, UT, WV
Yes - only when state funds are involved	10.0	CA, IL, ME, NM, WA
Yes - when the cost is over a certain dollar amount	4.0	MN, ND
No, but we have recommended guidelines	22.0	AL, ID, MI, MO, NC, OH, RI, SC, SD, TX, WY
No	19.0	AK, AR, AZ, CO, DE, IA, KS, LA, MS, MT, NE, NH, NV, OK, OR, TN, VA, VT, WI



REFERENCE NOTES FOR EXHIBIT 5: *NEED FOR MASTER PLAN IN DESIGN AND CONSTRUCTION*

Further explanation provided by the states:

CA: Districts must submit facilities plans to the CDE and state architect (both preliminary and final plans) for review.

CT: State statutes require long range planning in every school district

FL: Five year survey process of every school to identify renovation/remodeling/construction during that time frame.

GA: Each school system must develop a long-range facilities plan. Architectural drawings and specifications are reviewed for compliance with the program and space needs identified in the system's facilities plan. If there is any deviations from the plan, the school must explain and reconcile these difference before the drawings and specifications can be approved for construction.

IL: Plans are subject to state approval when state funds are involved.

IN: Each school district must submit a copy of the need assessment study along with the application for approval of the project.

KY: A facility plan including all capital constructions projects is approved by our State Board. All construction by LEA must be listed or a minor project.

MA: A long range plan for use of facilities is required.

MD: A five-year plan is required and must be updated every year by the school.

MN: A five-year facility plan is required when the cost is over $400,000.

ME: Administrative requirement; not written (yet) into rules or law

ND: A five year facility plan is required if the cost is over $150,000

NJ: New Jersey Dept. of Ed. requires a Five Year Long Range Facility Plan submittal by district - approvals to education specifications tied into needs of district plan.

NM: Only when Public School Capital Outlay (PSCO) funds are used a facilities master plan and a district wide maintenance plan is required.

SD: A five year plan is required; if any state funds are requested, to receive state funds the plan must specify "alternatives to construction" that have been implemented

WA: A district-wide six year study and survey must be filed with OSPI and reviewed and approved by the State Board of Education prior to design and construction. No master plan site layout is required prior to design.

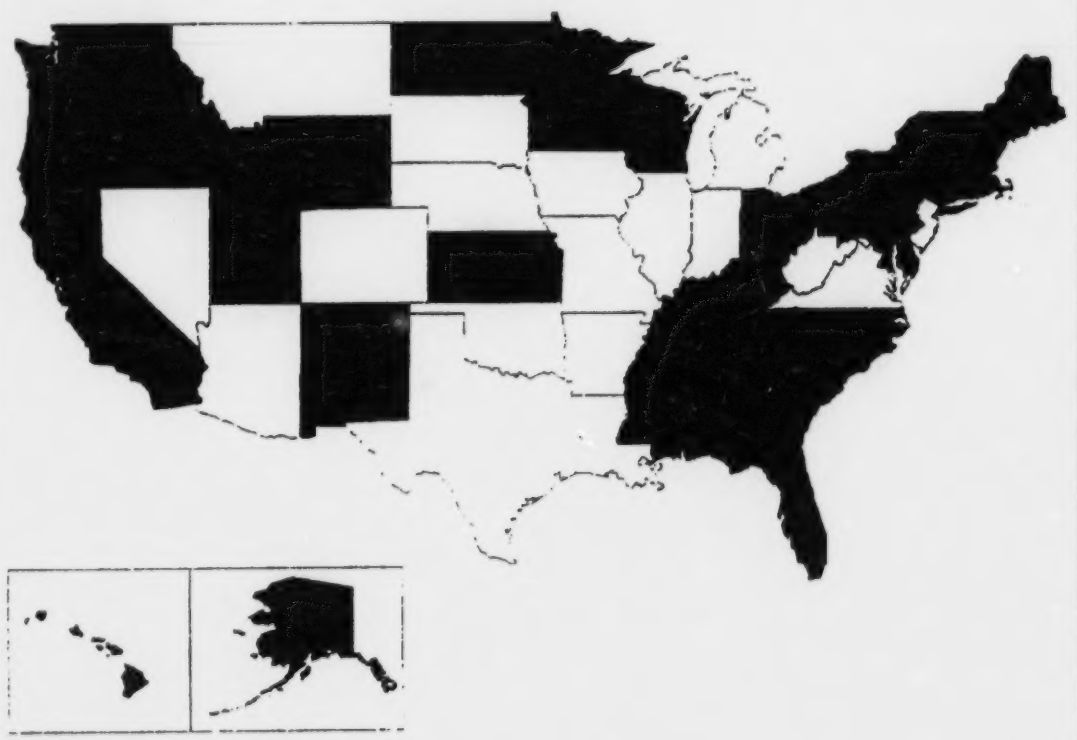
WV: Ten year comprehensive Plans are required from all school districts before expenditures may occur on the local and state level.

EXHIBIT 6

PRESENCE OF FINANCIAL ASSISTANCE PROGRAMS FOR SCHOOL CONSTRUCTION
(N=50)

HAVE A PROGRAM THAT PROVIDES FINANCIAL ASSISTANCE TO LOCAL DISTRICTS FOR SCHOOL CONSTRUCTION

Response	Response Rate(%)	Legend
State has a program	64.0	AK, AL, CA, CT, DE, FL, GA, HI, ID, KS, KY, MA, MD, ME, MN, MS, NC, ND, NH, NM, NY, OH, OR, PA, RI, SC, TN, UT, VT, WA, WI, WY
State does not have a program	36.0	AR, AZ, CO, IA, IL, IN, LA, MI, MO, MT, NE, NJ, NV, OK, SD, TX, VA, WV



REFERENCE NOTES FOR EXHIBIT 6: *PRESENCE OF FINANCIAL ASSISTANCE PROGRAMS FOR SCHOOL CONSTRUCTION*

Additional information provided by the states:

MN: We have a variety of programs. The primary one is debt service equalization.
ND: We have a $25,000,000 revolving fund which is loaned out to schools on a need basis.
VA: Although there is no program, the state provides low interest loans (2% to 5%)
WV: Legislative appropriation is pending for 94-95. However, approx. $300 million has been allocated from the SBA in the past 3 years.

EXHIBIT 7

STATISTICS ON STATES WITH A PROGRAM THAT PROVIDES FINANCIAL ASSISTANCE TO LOCAL DISTRICTS FOR SCHOOL CONSTRUCTION
(n=32)

State	Dollars Allocated to Local Districts for Const. (FY 94)	Percent Derived from Sale of State Bonds
AK	$420 million	0
AL	Over $1 million	No response
CA	$2.8 billion (92-94)	100
CT	$153 million	100
DE	$22.5 million	100
FL	$322 million	100
GA	$151 million	100
HI	$90 million	100
ID	$7 million (92-93)	0
KS	$7.4 million	0
KY	$37.5 million	28
MA	$159 million	N/A
MD	$60-75 million	The majority
ME	$67 million	0
MN	$26 million	0
MS	$28 million	0
NC	$10 million	0
ND	$5-7 million	0
NH	$15.5 million	0
NM	$67 million	63
NY	$300 million	0
OH	Over $68 million	100
OR	$5 million	0
PA	$200 million	0
RI	$17 million	0
SC	$15.4 million	0
TN	50%	0
UT	$14.9 million	0
VT	30%,40%, or 50%	30 - 50
WA	$136 million	40
WI	$1.6 billion	0
WY	nearly $8 ml requested	0

REFERENCE NOTES FOR EXHIBIT 7: ***STATISTICS ON STATES WITH A PROGRAM THAT PROVIDES FINANCIAL ASSISTANCE TO LOCAL DISTRICTS FOR SCHOOL CONSTRUCTION***

Additional information provided by the states:

AK: $170,000,000 for direct grants and $250,000,000 of new authorization for bond reimbursements.

HI: All construction is done by the state for the single school system.

DE: An additional $1,100,000 was provided for architectural barrier removal and asbestos abatement. Also, in FY94, the state provided some $5,800,000 for minor capital improvement and "emergency" repair projects.

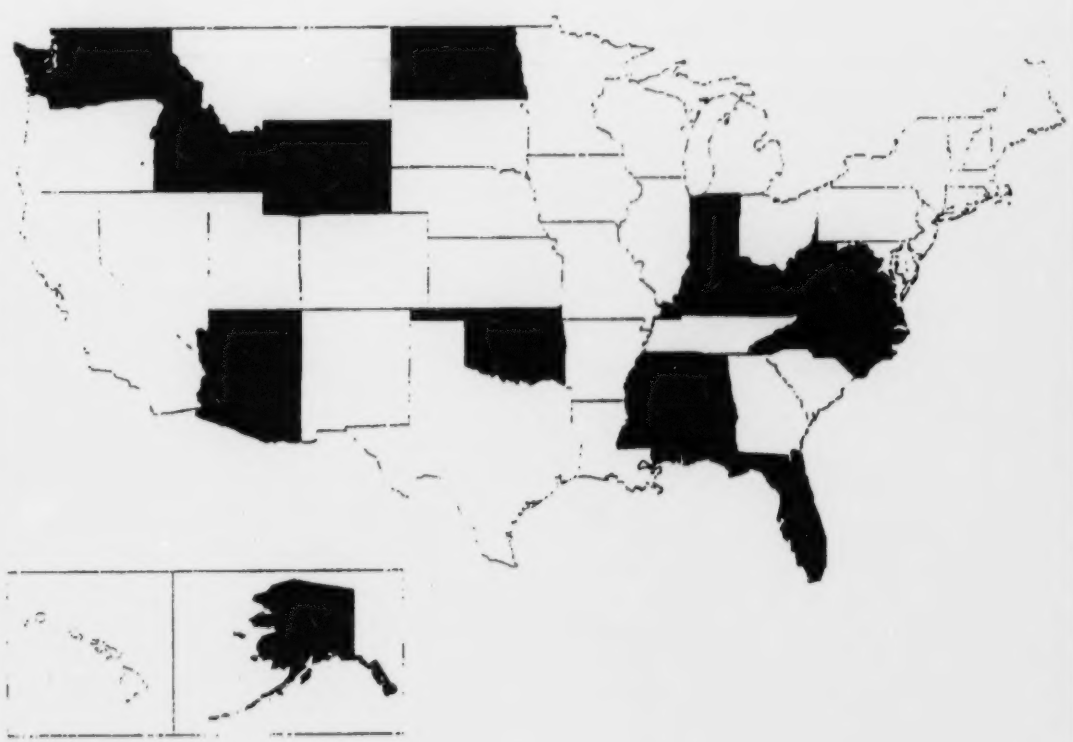
SC: The 1994 allocation is the lowest in some years and represents only the mandated amount established many years ago. A bond bill is being sought in the current legislative session.

EXHIBIT 8

DEDICATED REVENUE FOR SCHOOL CONSTRUCTION
(N=50)

DEDICATES SPECIFIC REVENUES TO ASSIST LOCAL DISTRICTS WITH SCHOOL CONSTRUCTION COSTS

Response	Response Rate(%)	Legend
Yes	30.0	AK, AL, AZ, FL, ID, IN, KY, MS, NC, ND, OK, VA, WA, WV, WY
No	70.0	AR, CA, CO, CT, DE, GA, HI, IA, IL, KS, LA, MA, MD, ME, MI, MN, MO, MT, NE, NH, NJ, NM, NV, NY, OH, OR, PA, RI, SC, SD, TN, TX, UT, VT, WI



REFERENCE NOTES FOR EXHIBIT 8: *DEDICATED REVENUE FOR SCHOOL CONSTRUCTION*

Dedicated sources as explained by the states:

AK: Cigarette tax, timber receipts.
AL: State aid is given to all systems based on enrollment. Several taxes (sales, income, liquor, lodging, hydro, utility, and others) comprise the Special Education Trust Fund which is allocated according to enrollment. This distribution has recently been deemed unconstitutional and will be revised to be more equitable.
AZ: Capital Levy Revenue Limit and Capital Outlay Revenue Limit are available, but generally not used for construction
FL: Gross receipts utilities tax and license tag fees
ID: A percentage of lottery proceeds goes directly to school building financing
IN: A grant of $40 per student in average daily attendance, grades 1-12, is allocated to public school corporations
KY: Require $0.05 equivalent levy per $100; state equalizes to 150% of statewide average assessment per child
MS: A portion of sales tax
NC: 60% of a $0.005 sales tax (enacted in 1986) and 30% of a $0.005 sales tax (1983) plus $36,302,273 in funds are provided statewide on an adm. basis (not included in funds in above exhibit)
ND: Coal Trust Fund
OK: Property tax, vehicle tax, and portions of various taxes and fees
VA: All state fines and forfeitures go into the low interest loan fund
WA: School trust land - Timber sales revenue is deposited in the state school construction account
WV: Property tax has been the source to date
WY: State land fees and sales tax

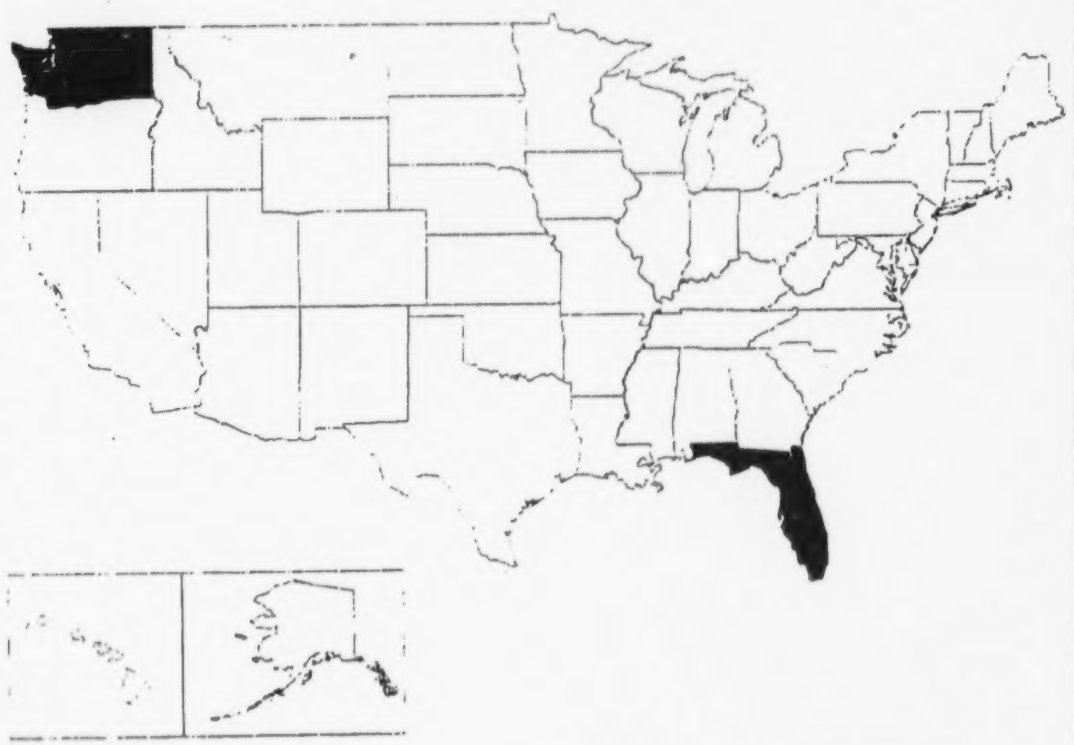
Note: Dedicated revenue to the general education fund does not apply, only if earmarked for the purpose of school facility construction.

EXHIBIT 9

AUTHORITY TO IMPOSE IMPACT FEES
(N=50)

HAVE STATE STATUTES THAT GIVE LOCAL SCHOOL DISTRICTS THE AUTHORITY TO IMPOSE IMPACT FEES

Response	Response Rate(%)	Legend
Yes	4.0	FL, WA
No	74.0	AK, AR, AZ, CT, DE, GA, IA, ID, IL, IN, KS, KY, LA, ME, MI, MN, MO, MS, ND, NE, NH, NJ, NM, NV, NY, OK, OR, PA, RI, SC, TN, UT, VA, VT, WI, WV, WY
Other/Don't Know	22.0	AL, CA, CO, HI, MA, MD, MT, NC, OH, SD, TX.



REFERENCE NOTES FOR EXHIBIT 9: *AUTHORITY TO IMPOSE IMPACT FEES*

Additional information provided by the states:

CA: County government can impose impact fees and share with school districts.
MD: County governments can impose impact fees and share with school districts.
MT: Counties impose the fee which schools receive a portion of the mining impact monies.
NC: Local units may implement a supplemental property tax for schools
OH: Pending
TX: Statutes allow local school districts independent funding and decision making; local school districts have charged impact fees
WA: Under state growth management act school districts may request county government to collect developer impact fees
WV: Consideration is being given to this proposal.

EXHIBIT 10

SELL BONDS AT THE LOCAL SCHOOL DISTRICT LEVEL
(N=50)

LOCAL SCHOOL DISTRICTS SELL BONDS TO HELP FUND CONSTRUCTION OF CAPITAL FACILITIES

Response	Response Rate(%)	Legend
Yes	98.0	AK, AL, AR, AZ, CA, CO, CT, DE, FL, GA, IA, ID, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, WY
No	2.0	HI

EXHIBIT 11

PERCENT OF LOCAL SCHOOL CONSTRUCTION FUNDED BY BONDS
(n=49)

State	Percent	State	Percent
AK	60.0	NC	67.0
AL	80.0	ND	75.0
AR	98.0	NE	93.0
AZ	90.0	NH	85.0-90.0
CA	Less than 50.0	NJ	90.0
CO	100.0	NM	95.0
CT	85.0-90.0	NV	90.0
DE	Nearly 100.0	NY	80.0
FL	Varies	OH	99.0
GA	80.0-85.0	OK	100.0
IA	100.0	OR	100.0
ID	90.0+	PA	100.0
IL	100.0	RI	100.0
IN	75.0-80.0	SC	80.0
KS	90.0	SD	70.0-90.0
KY	72.0	TN	50.0+
LA	N/A	TX	99.9
MA	90.0	UT	94.5
MD*	Varies	VA*	95.0
ME	46.0	VT	70.0
MI	100.0	WA	67.0
MN	60.0	WI	60.0
MO	95.0	WV	40.0
MS	50.0	WY	80.0-100.0
MT	90.0		

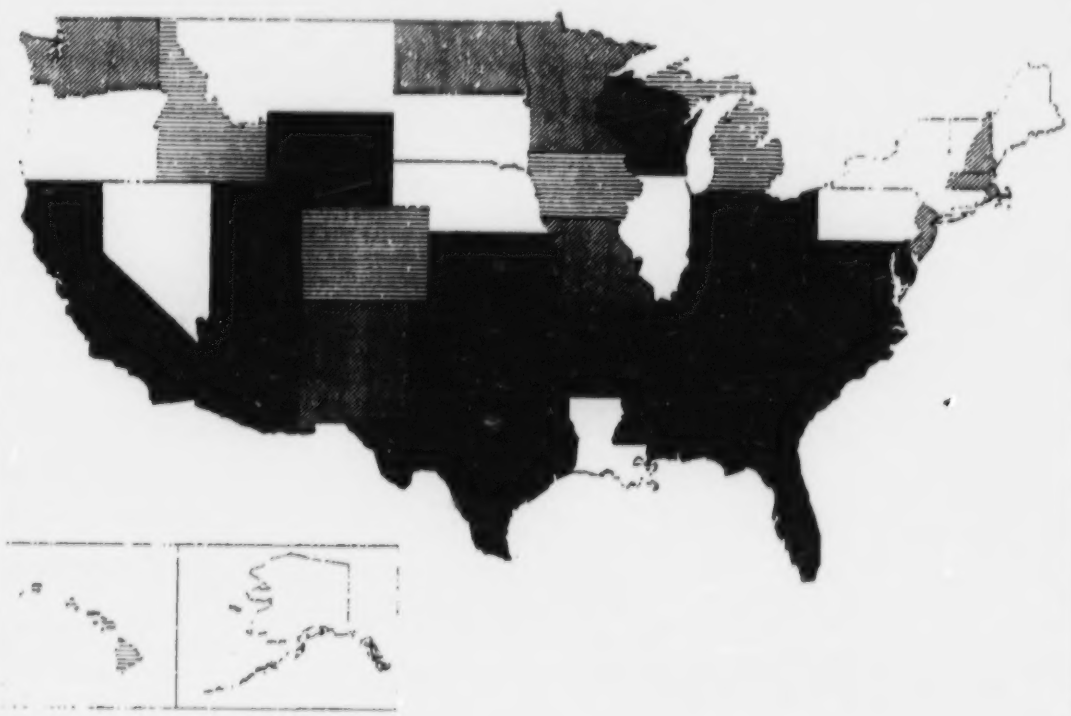
*The school districts, per se, do not issue bonds, but the city and/or county governments can authorize the issuance of bonds and provide the schools with capital outlay financing.

EXHIBIT 12

AIR CONDITIONING OF NEWLY CONSTRUCTED FACILITIES
(n=47)

PERCENT OF NEWLY CONSTRUCTED FACILITIES THAT ARE AIR CONDITIONED

Response	Response Rate(%)
None	6.0
Less than 50%	10.0
50% - 89%	16.0
90% and higher	46.0
Not available/unknown	22.0


Legend
ME, SD, VT
CO, HI, ID, IA, MI
MA, MN, MO, ND, NJ, NH, NM, WA
AL, AR, AZ, CA, DE, FL, GA, IN, KS, KY, MD, MS, NC, OH, OK, SC, TN, TX, UT, VA, WI, WV, WY
AK, CT, IL, LA, MT, NE, NV, NY, OR, PA, RI

REFERENCE NOTES FOR EXHIBIT 12: ***PERCENT OF NEWLY CONSTRUCTED FACILITIES THAT ARE AIR CONDITIONED***

Additional information provided by the states:

HI: Only on an exceptional basis
NH: Some are partially air conditioned; any would be approved
NM: Depends on location of school; only if air conditioning is necessary
OK: Excluding gymnasiums
WI: Most new buildings, if not all, have air conditioning in designated areas

EXHIBIT 13

PROCEEDS FROM THE SALE OF SCHOOL PROPERTY
(N=50)

STATE REQUIRES SHARE OF PROCEEDS FROM THE SALE OF SCHOOL PROPERTY IF STATE FUNDS WERE USED TO PURCHASE THE PROPERTY (IN WHOLE OR IN PART)

Response	Response Rate(%)	Legend
Yes	16.0	DE, HI, MA, MD, ME, ND, PA, VT
No	84.0	AK, AL, AR, AZ, CA, CO, CT, FL, GA, IA, ID, IL, IN, KS, KY, LA, MI, MN, MO, MS, MT, NC, NE, NH, NJ, NM, NV, NY, OH, OK, OR, RI, SC, SD, TN, TX, UT, VA, WA, WI, WV, WY

REFERENCE NOTES FOR EXHIBIT 13: ***PROCEEDS FROM THE SALE OF SCHOOL PROPERTY***

Additional information provided by the states:

MA: Share in proceeds if reimbursement payments are still being made
SC: Do not share in proceeds, however, we require proceeds from sale up to at least the state share must go back to capital (not operating) budget
VA: Do not share in proceeds, however, property is turned back to governing body

EXHIBIT 14

APPROXIMATE SQUARE FOOTAGE OF TYPICAL PORTABLE[1]
(N=50)

State	Square Footage	State	Square Footage
AK	1,000[2]	NC	800
AL	768	ND	950
AR	750	NH	950[2]
CA	960	NJ	500
CO	1,440	NM	900
CT	800[2]	NV	784
DE	950[2]	NY	770
FL	837[2]	OH	2,400
GA	660	OK	900
HI	812	OR	1,848
IA	900	RI	800
ID	850	SC	762
IL	700	SD	2,500
IN	800	TX	752
KS	1,500	UT	930
KY	768	VA	800
MD	900	VT	900
ME	1,440	WA	1,000[2]
MI	800	WI	650[2]
MS	820	WV	800

[1]Square footage may represent a portable with more than one room.
[2]Reported midpoint or average square footage.

REFERENCE NOTES FOR EXHIBIT 14: ***APPROXIMATE SQUARE FOOTAGE OF TYPICAL PORTABLE***

Additional information provided by the states:

AZ: Unknown
LA: Not available
MA: Not available
MN: Not available
MO: No specifications
MT: Unknown
NE: No data recorded
PA: Unknown
SC: Kindergarten - 104 sq. ft., grades 1 to 12 - 762 sq. ft. (single) or 1,524 sq. ft. (double)
TN: Minimum width not less than 19 ft.
VA: 800 sq. ft. grades 2 through 7
WY: Unknown, records kept at district level

EXHIBIT 15

APPROXIMATE STUDENT CAPACITY OF TYPICAL PORTABLE[1]
(N=50)

State	Student Capacity	State	Student Capacity
AK	25[2]	ND	25-30
AL	30	NH	25-30
AR	K is 20, 1-6 is 25, 7-12 is 30	NJ	25
CA	30	NM	20
CO	50	NV	26
CT	20-25	NY	27
DE	28	OH	60-80
FL	23[2]	OK	25-30
GA	20-25	OR	25-30
HI	28	RI	20-25
IA	30	SC	30
ID	30	SD	25-40
IL	25	TN	35
IN	26	TX	22-25
KS	20-25	UT	30-35
KY	Pre-K is 20, Ele. is 23, M/HS-25	VA	25
MD	Varies	VT	20-25
ME	50	WA	Ele-25, Sec 30[2]
MI	25	WI	20
MS	27	WV	25
NC	K-9 is 29, 10-12 is 31.5	WY	20-25

1Student capacity may represent a portable with more than one room.
[2]Reported midpoint or average student capacity.

REFERENCE NOTES FOR EXHIBIT 15: ***APPROXIMATE STUDENT CAPACITY OF TYPICAL PORTABLE***

Additional information provided by the states:

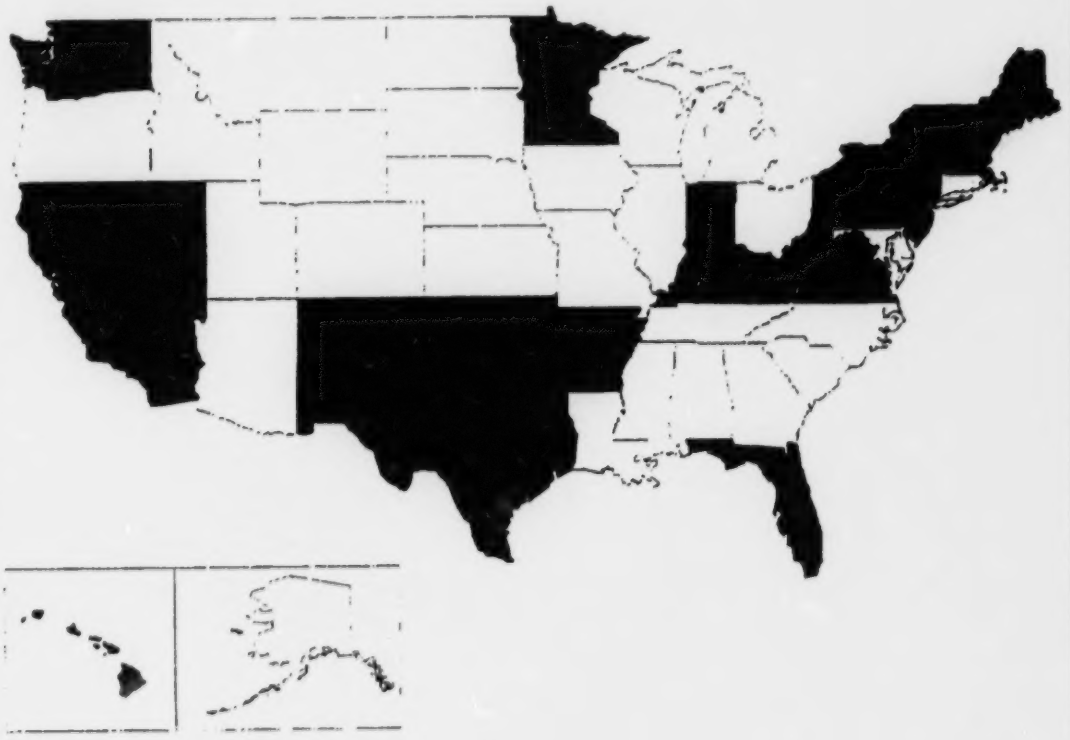
AZ: Unknown
LA: Not available
MA: Not available
MN: Not available
MO: No specifications
MT: Unknown
NE: No data recorded
PA: Unknown

EXHIBIT 16

"SCHOOL WITHIN A SCHOOL" PROGRAM
(N=50)

HAVE AN EXEMPLARY SCHOOL WITHIN A SCHOOL PROGRAM CURRENTLY IN OPERATION

Response	Response Rate(%)	Legend
Yes	42.0	AR, CA, FL, HI, IN, KY, MA, ME, MN, NH, NJ, NM, NV, NY, OK, PA, TX, VA, VT, WA, WV
No	58.0	AK, AL, AZ, CO, CT, DE, GA, IA, ID, IL, KS, LA, MD, MI, MO, MS, MT, NC, ND, NE, OH, OR, RI, SC, SD, TN, UT, WI, WY



REFERENCE NOTES FOR EXHIBIT 16: *"SCHOOL WITHIN A SCHOOL" PROGRAM*

Additional information provided by the states:

AK: One high school will be implementing a program for the 1994-95 school year
MD: Leading in that direction for secondary schools
NC: Two high schools are in the design process

858/exhibits

APPENDIX A

RESPONSE PERCENTAGES ON THE QUESTIONNAIRE

SCHOOL CONSTRUCTION SPECIFICATIONS AND FINANCING NATIONAL SURVEY DATA 1994

(N=50)

I. EDUCATIONAL SPECIFICATIONS

The Hawaii Department of Education has an extensive list of criteria which govern the construction of school facilities. The major elements of these criteria (called educational specifications) are identified in Question 1a below. We are interested in the extent to which your agency controls the school construction process through pre-determined specifications or standards. Your response to the following questions will assist in the review of Hawaii's current educational specification process.

1. Does your state insist on adherence to specific design criteria (other than building codes, ADA, etc.) for new school construction?

Yes - in all cases	28.0%
Yes - only when state funds are involved	6.0
Yes - when the cost exceeds a certain amount	6.0
No, but we have recommended guidelines - Skip to Q. 2	34.0
No - Skip to Q. 2	26.0

1a. IF YES: Please check the categories in which your state has criteria/guidelines. (n=20)

General classroom size	90.0%	Music rooms	80.0%
Classroom capacity	70.0%	Science rooms	90.0%
Special Education	60.0%	Foreign language	40.0%
Resource rooms	60.0%	Administration space	50.0%
Kindergarten rooms	95.0%	Library space	90.0%
Food service	65.0%	Physical education	85.0%
Counseling	50.0%	Black/white boards	45.0%
Storage space	35.0%	Other categories	50.0%
Display/tackboard	40.0%		
Vocational education rooms	70.0%		
Arts and Crafts rooms	85.0%		

2. Are your specifications subject to approval by any other state agency? (N=50)

Yes	38.0%
No	72.0

3. If the educational specifications are determined in whole or in part at the local level, are the resulting plans subject to review by your department?

Yes	66.0%
No	34.0

4. Does your state specify general space guidelines, standards, or allowances (e.g. 100 GSF/pupil at grades K-6)?

Yes	60.0%
No	40.0

II. PLANNING

1. Does your state require that a master plan for a school be in effect prior to the design and construction of new facilities for that school?

Yes - in all cases	26.0%
Yes - only when state funds are involved	10.0
Yes - when the cost exceeds a certain amount	4.0
No, but we have a recommended process	22.0
No	19.0

III. OTHER

1. According to information provided by the American Education Finance Association, your state does/does not have a program providing financial assistance to local districts for school construction.

State has such a program	64.0%
State does not have such a program	36.0

a. The amount of dollars allocated for fiscal year 1994 are: (n=32)

If the state has a program providing financial assistance to local districts for school construction the dollars allocated to local districts in FY 1994 were:*

Less than $10 million	18.8%
$10 million - $49.9 million	28.1
$50 million - $99.9 million	15.6
$100 million - $499.9 million	25.0
$500 million - $999.9 million	0.0
$ 1 billion or more	6.3
Allocated funds given as a percent	6.3

*Figures for two states were from different fiscal years. The figure for California was reported from FYs 1992-94 and the dollar amount for Idaho was for FY 1992-93.

b. The percent of allocated funds derived from the sale of state bonds:

None	56.3%
1% - 49%	9.4
50% - 99%	6.3
100%	21.9
No response/unknown	6.3

2. Has your state dedicated any specific revenues (e.g., lotteries, liquor tax, etc.) to assist local districts with school construction costs?
(N=50)

Yes	30.0%
No	70.0

3. Does your state have statutes that give local school districts the authority to impose "impact fees"?

Yes	4.0%
No	74.0
Other/Don't know	22.0

3a. IF NO: Have local school districts in your state charged impact fees to help fund construction of capital facilities?
(n=37)

Yes	2.7%
No	91.9
Don't know	5.4

4. Do local school districts in your state sell bonds to help fund construction of capital facilities?
(N=50)

Yes	98.0%
No	2.0

IF YES: Approximately what percent of local school construction is funded by bonding?
(n=49)

Less than 50%	6.1%
50% - 89%	36.7
90% and higher	49.0
Varies/non-specific	6.1
Not available/unknown	2.0

5. What percent of newly constructed facilities are air conditioned?

None	6.0%
Less than 50%	10.0
50% - 89%	16.0
90% and higher	46.0
Not available/unknown	22.0

6. If a local district in your state sells school property, does the state require a share in the proceeds if state funds were used (in whole or in part) to purchase the property?

Yes	16.0%
No	84.0

7. What is the approximate square footage and student capacity of the typical portable classroom building used in your state?

   a. Square footage:

Less than 600	4.0%
600-699	4.0
700-799	14.0
800-899	20.0
900-999	20.0
1,000 and higher	16.0
No response	22.0

   b. Student capacity:

20.0 - 23.9	18.0%
24.0 - 27.9	34.0
28.0 - 31.9	14.0
32.0 and higher	16.0
No response/varies	20.0

8. Hawaii is interested in "school within a school" programs. These are called "house plans" in some localities. Does your state have any exemplary school within a school programs currently in operation?

Yes	42.0%
No	58.0

858/response.all

APPENDIX B

SURVEY RESPONDENTS

APPENDIX B
SURVEY RESPONDENTS

1. ***Alabama***
   Mr. R.E. Higginbotham
   Coordinator, School Facilities Section

2. ***Alaska***
   Ms. Sue Miller
   Grants Administrator

3. ***Arizona***
   Mr. James L. Wilson, Sr.
   Administrative Services Officer

4. ***Arkansas***
   Mr. Dan Lovelady
   Coordinator, School Plant Service

5. ***California***
   Mr. Duwayne Brooks
   Assistant Superintendent

6. ***Colorado***
   Mr. Dan Stewart
   Assistant Commissioner

7. ***Connecticut***
   Mr. Richard S. Krissinger, AIA
   Architect, School Facilities

8. ***Delaware***
   Mr. Edward M. Shimamoto
   Education Associates,
   School Plant Planning & Maintenance

9. ***Florida***
   Dr. James Schroeen
   Deputy Commissioner for Education Facilities

10. ***Georgia***
    Mr. Frank G. Cloer
    Director, Facilities Services Section

11. ***Hawaii***
    Mr. Paul Kiyabu
    Director, Facilities and Support Services

12. ***Idaho***
    Mr. Eldon L. Nelson
    Supervisor, Support Services

13. ***Illinois***
    Mr. John Dee
    Manager, School Organization/Facilities

14. ***Indiana***
    Ms. Sandra D. Hawkins
    Consultant Division, School Facility Planning

15. ***Iowa***
    Mr. C. Milton Wilson
    Consultant, School Facilities

16. ***Kansas***
    Mr. Rod Elder
    Facilities Specialist

17. ***Kentucky***
    Mr. Michael L. Luscher
    Principal Assistant, District Support Services

18. ***Louisiana***
    Mr. Stephen A. Parker
    Management and Budget Administrator

19. ***Maine***
    Mr. Walter Ruark
    Director, Division of School Business Services

20. ***Maryland***
    Mr. Allen C. Abend
    Chief, School Facilities

21. ***Massachusetts***
    Mr. John L. Caverly
    Education Specialist

APPENDIX B (Continued)
SURVEY RESPONDENTS

22. ***Michigan***
Mr. Richard P. Kelley
Administrator, School Bond Loan Program

23. ***Minnesota***
Mr. Daniel E. Bryan
Director of the Office of District Organization

24. ***Mississippi***
Mr. James E. Reeves
Director of School Buildings

25. ***Missouri***
Mr. Gary W. Jones
Director, Administrative Services

26. ***Montana***
Ms. Madalyn Quinlan
Revenue Analyst

27. ***Nebraska***
Mr. Dennis Pool
Administrator, School District Organization Services

28. ***Nevada***
Ms. Linda Smith
Program Officer

29. ***New Hampshire***
Dr. Ed W. Taylor
Consultant, School Construction and Finance

30. ***New Jersey***
Mr. Carl Letterie
Director of Facilities

31. ***New Mexico***
Mr. Alfred Herrera
Director, School Budget Planning Unit

32. ***New York***
Mr. Charles Szuberla
Associate Architect

33. ***North Carolina***
Mr. Gerald H. Knott, AIA
Consulting Architect

34. ***North Dakota***
Mr. Tom Decker
Director, School Finance and Organization

35. ***Ohio***
Mr. Jack D. Hunter
Supervisor of School Facilities

36. ***Oklahoma***
Ms. Sandy Garrett
State Superintendent of Public Instruction

37. ***Oregon***
Mr. Al Shannon
Coordinator, School Business Systems

38. ***Pennsylvania***
Mr. Bradford J. Furey
Chief, Division of School Facilities

39. ***Rhode Island***
Mr. Edward Handy
Education Specialist/Planner

40. ***South Carolina***
Mr. John B. Kent
Director, District Facilities Management

41. ***South Dakota***
Mr. Dean J. Buchanan
Education Specialist, Division of Education

42. ***Tennessee***
Mr. James Abernathy
Assistant Commissioner

43. ***Texas***
Mr. Otto Grove
Director of School Facilities

44. ***Utah***
Mr. Larry Newton
Educational Specialist for Property Tax and School Facilities

45. ***Vermont***
Mr. Douglas Chiappetta
Manager, School Construction Program

APPENDIX B (Continued)
SURVEY RESPONDENTS

46. ***Virginia***
Mr. David L. Boddy
Director of Facilities Services

47. ***Washington***
Mr. Michael E. Roberts
Director, School Facilities and Organization, OSPI

48. ***West Virginia***
Mr. David A. Sneed
Chief of Architectural Services

49. ***Wisconsin***
Mr. Brad Adams
School Facilities Consultant

50. ***Wyoming***
Ms. Judy Kishman
Education Program Specialist

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